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Realizing the Tea Promise

KENYA TEA INDUSTRY PERFORMANCE HIGHLIGHTS FOR NOVEMBER 2024

PRODUCTION

Tea production for the month of November 2024 dropped by 3.49 Million Kgs from 50.90 Million Kgs recorded during the same period of 2023 to 47.41 Million Kgs. Lower production was attributed to generally low and poorly distributed rainfall experienced within the country. Though the month marks the pick of the “Short-rains” season, the amount of rainfall recorded in most parts of the tea growing areas was depressed (near-to-below average precipitation of the amounts usually recorded in the month of November). Unlike low and poorly distributed rainfall experienced in the month of October and November 2024, the “Short-rains” season in 2023 recorded moderate and well distributed precipitation characterized by heavy storms and warmer temperatures, which was associated with El Niño weather conditions.

During the first three weeks of November 2024, most of the tea growing areas within the West of Rift and East of Rift experienced low to moderate rainfall of between 13mm to 55 mm daily with the exception of Embu/Meru catchment, which recorded higher precipitation of ranging from 68 to 145 mm daily. Consequently, production in tea growing areas within the East of Rift was significantly lower by 2.63 Million Kgs from 16.54 Million Kgs recorded in the month of November 2023 to 13.90 Million Kgs. Similarly, output within the West of Rift was lower by 0.85 Million Kgs from 34.36 Million Kgs to 33.50 Million Kgs.

Across the tea manufacturers, the highest drop in production was recorded mostly by the smallholder tea factories managed by KTDA due to their wider coverage in areas that experienced low rainfall conditions within the East of Rift, mostly in Kiambu, and Muranga/Nyeri/Kirinyaga counties. Consequently, production by the smallholder tea factories dropped by 2.16 Million Kgs from 25.01 Million Kgs to 22.85 Million Kgs. Similarly, production by the Estate factories dropped by 1 Million Kgs from 12.80 Million Kgs to 11.79 Million Kgs since they are more widely spread in areas that experienced low rainfall conditions within the West of Rift, mostly in Nandi, Bomet and Kisii/Nyamira counties. Notably, decrease in production by factories in the category of Independent tea producers and Nyayo T. Zones, respectively was insignificant.



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Cumulatively up to the month of November, production for the year 2024 was higher by 5.18% (26.72 Million Kgs) from 515.92 Million Kgs recorded during the first eleven months of 2023 to 542.64 Million Kgs. Higher production was due to favourable weather recorded during the first four months of the year, which recorded higher rainfall owing to *El-Nino* weather phenomenon.

Table 1: Production by Sub-Sector and Region (Nov. 2024 vis-à-vis Nov. 2023)

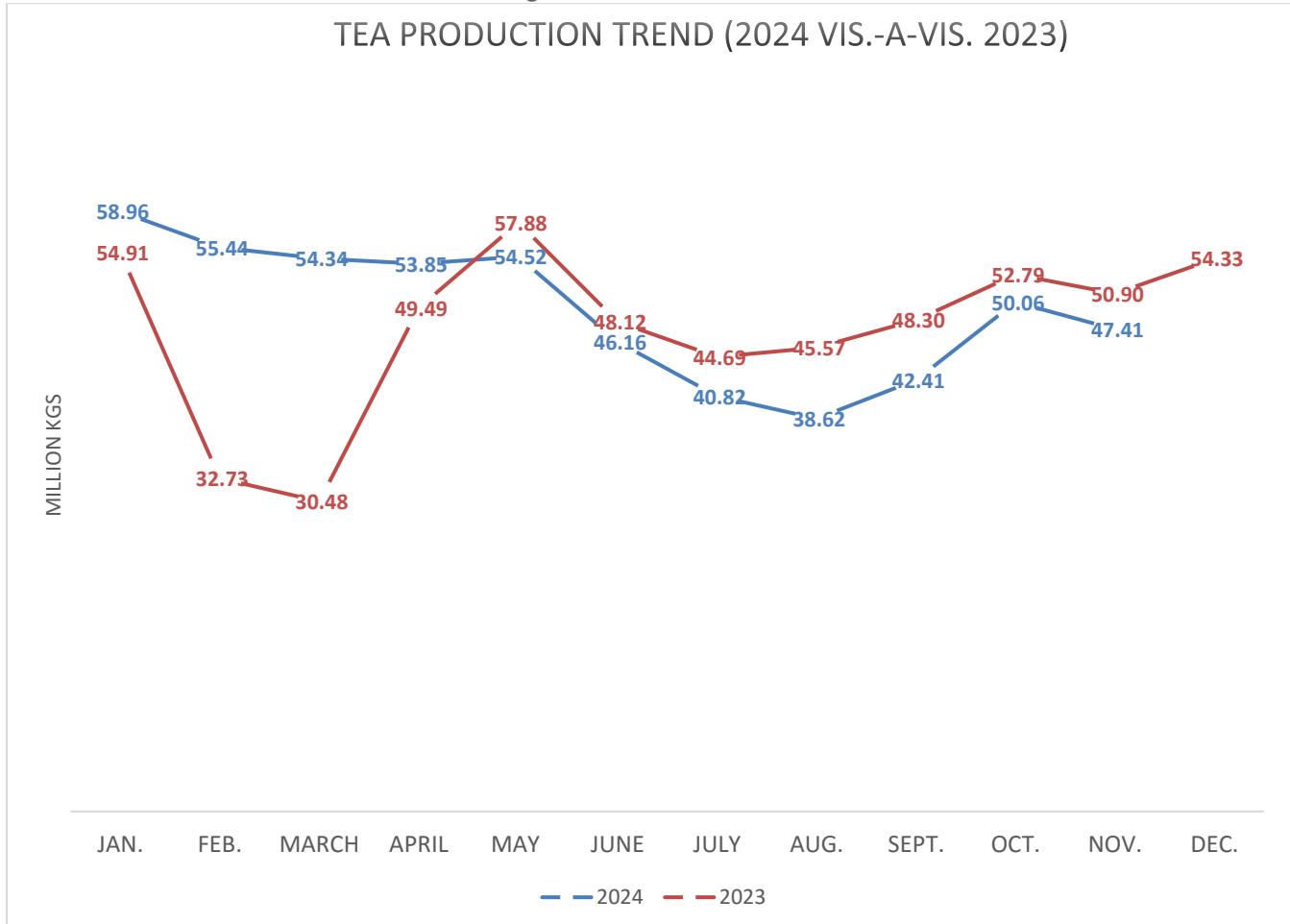
Sector/factory	Block	Nov-24	Nov-23	Variance +/-	Var.(%)	Jan-Nov 2024	Jan-Nov 2023	Variance +/-	Var.(%)
Estates	West of Rift	11,410,429	12,454,646	-1,044,218	-8.38%	126,697,079	127,417,845	- 720,766	-0.57%
	East of Rift	383,976	345,391	38,585	11.17%	3,571,068	3,551,340	19,729	0.56%
	Total	11,794,405	12,800,037	-1,005,633	-7.86%	130,268,147	130,969,184	- 701,037	-0.54%
Smallholders-KTDA	West of Rift	10,631,922	10,436,626	195,296	1.87%	132,246,398	108,367,912	23,878,485	22.03%
	East of Rift	12,219,070	14,581,733	-2,362,663	-16.20%	151,213,461	141,246,039	9,967,421	7.06%
	Total	22,850,992	25,018,359	-2,167,367	-8.66%	283,459,858	249,613,952	33,845,907	13.56%
Independents	West of Rift	11,067,737	11,091,251	- 23,514	-0.21%	109,868,809	115,218,468	- 5,349,659	-4.64%
	East of Rift	1,212,403	1,474,056	- 261,653	-17.75%	14,389,251	14,148,857	240,394	1.70%
	Total	12,280,140	12,565,307	- 285,167	-2.27%	124,258,060	129,367,325	- 5,109,265	-3.95%
Nyayo T. Zones	West of Rift	398,625	381,036	17,589	4.62%	3,273,581	4,522,735	- 1,249,154	-27.62%
	East of Rift	88,428	140,784	- 52,356	-37.19%	1,386,398	1,451,018	- 64,620	-4.45%
	Total	487,053	521,820	- 34,767	-6.66%	4,659,979	5,973,753	- 1,313,774	-21.99%
Estates, Smallholder, Independents & Nyayo Tea. Zones	West of Rift	33,508,712	34,363,559	- 854,847	-2.49%	372,085,866	355,526,960	16,558,906	4.66%
	East of Rift	13,903,877	16,541,964	-2,638,087	-15.95%	170,560,178	160,397,254	10,162,924	6.34%
	Grand Total	47,412,589	50,905,523	-3,492,934	-6.86%	542,646,044	515,924,214	26,721,830	5.18%



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TEA PRODUCTION TREND (2024 VIS.-A-VIS. 2023)



During the month of November, the volume of speciality teas produced was 864,984 Kgs, which represented 2% of the total production. Speciality teas were dominated by Orthodox teas at 95% (817,475 Kgs) and was largely produced by Estates and Independents tea factories, respectively. The rest of speciality teas consisted of Green and Purple tea produced largely by the Cottage tea industries.

TEA SALES

AUCTION

Auction sales volume for Kenya tea during the month of November 2024 stood at 31.08 Million Kgs, which was lower compared to 33.17 Million kgs recorded during the corresponding month of 2023. The average monthly auction price for Kenya tea was slightly higher at 2.22 USD per Kg against 2.17 USD for the same period of 2023. However, prices of tea followed the quality with “Good” to “Medium” categories across



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the grades (well sorted and black appearance in leaf characteristics and brighter infusions and liquors) attracting more competitive bids and considerably higher prices compared to “Lower Medium” and “Plainer” teas and secondary grades, which attracted either less interest and thus discounted prices or no offers and consequently constituted the highest proportion of teas on offer at the auction that were withdrawn. Depending on the quality band, the leaf grades generally attracted relatively higher prices than the dust and secondary grades, respectively.

During the month of November 2024, tea offered for sale by the smallholder tea factories managed by KTDA, whose quality is relatively higher fetched an average price of 2.74 USD per Kg for the main grades against 2.86 USD recorded during the same period of 2023.

Compared to the previous months, absorption for teas offered under the main catalogue was fairly improved at 75%. This followed the suspension of reserve price effective from 30th September 2024 and anticipation of higher demand by consumers during the winter season. During the month of November, Pakistan and Afghanistan buyers maintained strong buying support while the Middle East, UK and China had good interest. However, Russia, Kazakhstan and other CIS states showed selective buying support while Sudan and South Sudan maintained steady buying.

Though there was generally improved demand for tea offered at the auction, the prices continued to be impacted negatively by relatively higher supply. The demand for tea at the auction continued to be affected by the effects of global economic shock experienced in most countries due to the Russia-Ukraine crisis and market access challenges owing to internal conflict in Sudan as well as shipment disruptions along the Red Sea.

Table 2: Auction Sales (2024 vis-à-vis 2023)

	2024		2023		Variance			
	Vol. M. Kgs	Value (USD/KG)	Vol. M. Kgs	Value (USD/KG)	Vol.	%	Value	%
January	42.48	2.19	61.25	2.30	-18.76	-31%	-0.11	-5%
February	39.11	2.23	53.21	2.34	-14.10	-26%	-0.11	-26%
March	42.35	2.15	43.72	2.39	-1.37	-3.1%	-0.23	-10%



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April	43.60	2.29	51.75	2.37	-8.15	-16%	-0.08	-3%
May	31.05	2.18	30.75	2.21	0.30	1.0%	-0.03	-1.4%
June	28.47	2.14	29.73	2.09	-1.26	-4.2%	0.05	2.76%
July	34.14	2.21	33.37	2.09	0.77	2.31%	0.12	5.7%
August	25.11	2.20	30.74	2.26	-5.63	-18%	-0.06	-2.7%
September	22.60	2.25	27.37	2.10	-4.77	-17%	0.15	7.14%
October	32.58	2.07	38.63	2.16	-6.05	-16%	-0.09	-4.17%
November	31.08	2.22	33.17	2.17	0.05	0.2%	-2.09	-6.3%
TOTAL/AVG.	372.57	2.19	433.69	2.23	-61.12	-14%	-0.03	-1.4%

EXPORTS

The total export volume for the month of November 2024 was lower by 18% (10.33 Million Kgs) from 57.13 Million Kgs recorded in the same period of 2023 to 46.80 Million Kgs. During the month, Kenya tea was consigned to fifty-five (55) export destinations compared fifty-nine (59) or the same period of 2023. Lower export volume was largely attributed to less imports by Pakistan, Yemen, U.A.E and Sudan respectively. However, Pakistan maintained its position as the leading export destination for Kenya tea having imported 16.81 Million Kgs, which accounted for 36% of the total export volume. Egypt was the second largest export destination having imported 7.35 Million Kgs and was followed by U.K (3.12 Million Kgs); Russia (2.29 Million Kgs); U.A.E (2.06 Million Kgs); India (1.81 Million Kgs); China (1.68 Million Kgs); Poland (1.44 Million Kgs); Sudan (1.01 Million Kgs); and Jordan (0.98 Million Kgs).

The top ten export destinations, majority of which are traditional markets for Kenya tea accounted for 82% of Kenya tea export volume. Apart from Pakistan, U.K, U.A.E and Sudan, all the other traditional markets recorded higher imports for Kenya tea. Similarly, emerging markets of Jordan, Switzerland, and Sri Lanka recorded improved imports from Kenya. However, market access challenges continue to face a number of export destinations such as Sudan, North Africa and Europe. For the last one and a half years, exports to Sudan have been affected by internal conflict while attacks on vessels along the Red Sea by Yemen Terrorist group has continued to affect shipments

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to markets in Europe and North Africa. Despite these challenges, other destinations such as Russia, India, China, Chad and South Sudan have continued to expand rapidly as key markets for Kenya tea. Following disruption of its import transhipment route through Sudan due to internal conflict, Chad has resulted to direct importation from Kenya through Nigeria and Cameroon as alternative transhipment routes. There were also shipments to seasonal markets such as Georgia; Morocco; Austria; Argentina; Mozambique; Cyprus; and Syria, which were largely in value added form. During the month of November, value added tea exports amounted to 918,753 Kgs, which represented 2% of the total exported volume. The exports in value added form were shipped to sixteen (16) market destinations which included UK; Sudan; Somalia; Oman; Cote D'Ivoire; USA; Ireland; Burkina Faso; Malaysia; Syria; Niger; U.A.E; South Africa; China; Poland; and Belgium.

Out of the total exports of value-added tea, United Kingdom accounted for the highest volume at 34% and was followed by Sudan at 14%. Somalia and Oman accounted for 12% and 11%, respectively. Other significant importers of value-added teas included Cote D'Ivoire; USA; Ireland; and Burkina Faso.

During the eleven-month period of 2024, cumulative tea export volume was higher by 16% (75.95 Million Kgs) from 471.68 Million Kgs recorded in the same period of 2023 to 547.63 Million Kgs. The export earnings was also higher at Kshs 169.49 Billion against Kshs 161.70 Billion for the same period of 2023 on account of higher export volume and stable exchange rate to the USD.

LOCAL TEA SALES

Local tea sales for November 2024 was lower at 3.26 Million Kgs compared to 3.31 Million Kgs recorded in November 2023 and 3.28 Million Kgs recorded in the corresponding month of 2022. Cumulatively, tea sales for the first eleven months of 2024 was slightly lower at 33.83 Million Kgs against 33.84 Million Kgs for the same period of 2023 but higher compared to 31.17 Million Kgs for the period January to November 2022.

Table 3: Local Sales (Jan.- Nov. 2024 compared to Jan.- Nov. 2023)

	2024 KGS	2023 KGS	VARIANCE	% VARIANCE



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January	3.30	3.02	0.28	9.3%
February	2.83	2.92	-0.09	-3.1%
March	2.94	2.97	-0.03	-1.0%
April	3.22	2.56	0.66	25.8%
May	3.32	3.08	0.24	7.8%
June	2.86	2.85	0.01	0.35%
July	2.74	3.09	-0.35	-11.3%
August	3.28	3.71	-0.43	-11.6%
September	2.74	2.99	-0.25	-8.4%
October	3.34	3.34	0.00	0.00%
November	3.26	3.31	-0.05	-1.51%
TOTAL	33.83	33.84	-0.01	-0.03%

27TH DECEMBER 2024

WILLY K. MUTAI

CEO, TBK



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Appendix 1: Kenya Tea Exports by Destination (Nov. 2024 vis-à-vis Nov. 2023)

DESTINATION	Nov. 2024- QUANTITY KGS	Nov. 2023 - QUANTITY KGS	QUANTITY VARIANCE KGS	%AGE VARIANCE
PAKISTAN	16,812,776	24,454,506	(7,641,730)	-31%
EGYPT	7,358,417	6,629,122	729,295	11%
UK	3,126,363	3,946,024	(819,661)	-21%
RUSSIAN	2,292,199	1,651,517	640,682	39%
UAE	2,064,844	4,061,895	(1,997,051)	-49%
INDIA	1,813,937	985,526	828,411	84%
CHINA	1,689,623	730,856	958,767	131%
POLAND	1,442,210	892,948	549,262	62%
SUDAN	1,012,467	2,212,761	(1,200,294)	-54%
JORDAN	988,750	339,000	649,750	192%
SAUDI ARABIA	818,588	650,525	168,063	26%
SWITZERLAND	796,688	284,072	512,616	180%
IRAN	761,711	968,125	(206,414)	-21%
KAZAKHSTAN	542,443	650,386	(107,943)	-17%
SRI LANKA	506,154	46,072	460,082	999%
AFGHANISTAN	444,422	604,658	(160,236)	-27%
CHAD	415,182	954,726	(539,544)	-57%
IRELAND	400,852	339,216	61,636	18%
YEMEN	284,914	2,398,313	(2,113,399)	-88%
SOMALIA	284,097	644,136	(360,039)	-56%
MALAYSIA	274,251	496,898	(222,647)	-45%
JAPAN	251,744	304,436	(52,692)	-17%
TURKEY	239,045	126,260	112,785	89%
UKRAINE	232,487	351,837	(119,350)	-34%
GERMANY	217,712	115,378	102,334	89%
NIGERIA	214,389	325,967	(111,578)	-34%
UZBEKISTAN	183,178	300,056	(116,878)	-39%
SOUTH AFRICA	177,241	122,072	55,169	45%
OMAN	141,792	202,160	(60,368)	-30%
USA	136,282	120,830	15,452	13%
CANADA	93,300	76,620	16,680	22%
COTE D'IVOIRE	90,560	43,982	46,578	106%
QATAR	79,600	63,626	15,974	25%
GHANA	77,381	53,328	24,053	45%
AUSTRALIA	69,420	48,000	21,420	45%
TAIWAN	55,240	51,200	4,040	8%
HONG KONG	52,064	16,062	36,002	224%



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IRAQ	46,000	77,686	(31,686)	-41%
SINGAPORE	42,932	20,000	22,932	115%
DJIBOUTI	28,000	13,996	14,004	100%
MAURITIUS	27,280		27,280	
GEORGIA	27,000		27,000	
SOUTH SUDAN	26,000	51,545	(25,545)	-50%
BURKINA FASO	25,876	23,286	2,590	11%
NEW ZEALAND	25,680		25,680	
ARGENTINA	24,000		24,000	
NETHERLANDS	24,000	78,912	(54,912)	-70%
KYRGYZSTAN	20,400	102,000	(81,600)	-80%
BAHRAIN	16,546		16,546	
SYRIAN	7,860		7,860	
VIET NAM	6,990	70,002	(63,012)	-90%
NIGER	5,174		5,174	
BRAZIL	4,165		4,165	
KUWAIT	2,200		2,200	
BELGIUM	360		360	
ANGOLA		1,200	(1,200)	-100%
AZERBAIJAN		96,000	(96,000)	-100%
BANGLADESH		142,416	(142,416)	-100%
CENTRAL AFRICAN REPUBLIC		23,792	(23,792)	-100%
CHILE		5,712	(5,712)	-100%
EL SALVADOR		14,648	(14,648)	-100%
GABON		5,174	(5,174)	-100%
HUNGARY		1,000	(1,000)	-100%
INDONESIA		2,600	(2,600)	-100%
ISRAEL		9,600	(9,600)	-100%
KOREA		200	(200)	-100%
ROMANIA		6,600	(6,600)	-100%
SPAIN		26,130	(26,130)	-100%
ZAMBIA		99,360	(99,360)	-100%
TOTAL	46,802,786	57,134,955	(10,332,169)	-18%



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Appendix 2: Kenya Tea Exports by Destination (Jan.- Nov. 2024 vis-à-vis Jan.- Nov. 2023)

DESTINATION	2024-QUANTITY		2023-QUANTITY	
	KGS	VALUE	KGS	VALUE
PAKISTAN	190,736,545	65,545,774,374	187,535,593	66,488,092,433
EGYPT	80,286,738	22,255,787,845	59,577,071	19,850,877,937
UK	52,358,940	15,758,382,437	41,169,057	12,907,741,565
UAE	27,676,481	9,590,615,649	26,210,231	9,292,865,360
RUSSIA	25,961,896	6,811,471,000	16,715,111	4,752,071,177
INDIA	15,531,212	3,576,672,977	4,515,970	1,510,952,962
SAUDI ARABIA	14,961,371	5,750,422,189	7,350,295	2,788,760,212
YEMEN	13,625,586	5,396,769,398	20,859,978	8,263,843,569
IRAN	12,271,594	4,096,161,507	11,421,361	3,947,545,969
CHINA	11,087,439	2,503,490,432	3,942,469	1,340,785,910
POLAND	10,690,715	2,541,686,664	6,986,280	2,008,954,978
SUDAN	9,643,075	2,095,054,949	11,487,141	2,763,411,835
KAZAKHSTAN	7,649,963	2,680,953,432	5,905,757	2,231,297,887
CHAD	6,941,594	1,096,768,218	1,856,121	337,169,180
SOMALIA	6,262,325	935,356,377	3,464,442	566,856,026
IRELAND	5,876,901	2,741,992,449	5,327,920	3,169,604,236
SWITZERLAND	5,412,437	1,156,777,439	3,164,179	753,584,540
JORDAN	4,396,074	1,689,355,113	6,073,040	2,390,175,418
OMAN	3,965,299	1,311,556,268	1,550,042	454,886,176
AFGHANISTAN	3,930,879	1,242,843,894	10,356,805	3,582,332,951
NIGERIA	3,792,038	881,129,964	2,526,446	712,097,680
MALAYSIA	3,667,975	867,800,459	3,009,806	999,364,563
UKRAINE	3,439,965	713,959,883	2,504,597	635,070,958
SRI LANKA	3,342,834	622,462,348	923,774	216,535,952
USA	2,754,861	1,290,319,813	1,837,760	949,767,093
JAPAN	2,741,469	846,158,781	2,302,308	863,216,664
GERMANY	2,111,444	487,818,980	1,166,782	315,268,401
NETHERLANDS	1,988,527	455,979,015	1,587,364	442,057,883
SOUTH AFRICA	1,821,969	374,762,502	1,235,238	373,235,116
TURKEY	1,288,076	410,505,565	1,527,290	504,133,838
QATAR	1,209,522	292,869,119	1,207,384	345,435,982
SOUTH SUDAN	911,063	204,003,624	279,324	62,007,789
CANADA	794,373	246,496,362	977,893	364,255,100
UZBEKISTAN	712,037	233,141,953	899,572	327,445,346
TAIWAN	543,685	170,089,468	611,509	167,518,527
AUSTRALIA	520,057	111,962,945	75,670	18,065,495
DJIBOUTI	420,600	114,819,050	328,291	103,002,580
HONG KONG	419,050	70,795,922	316,923	68,619,243



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MAURITIUS	410,780	103,427,063	443,494	121,947,694
BURKINA FASO	402,141	344,152,922	209,459	180,660,776
IRAQ	380,344	91,273,172	177,012	47,357,397
COTE D'IVOIRE	367,390	321,853,735	258,810	242,398,964
KYRGYZSTAN	357,525	123,729,094	199,500	91,663,294
BANGLADESH	339,714	74,204,040	526,019	89,577,536
GHANA	332,840	65,299,175	220,527	46,275,743
SINGAPORE	330,568	169,610,425	243,797	187,190,837
EPZ	296,642	88,844,040	6,719,137	2,384,829,924
ERITREA	265,382	83,574,833	308,190	95,177,263
CENTRAL AFRICAN REPUBLIC	243,074	33,305,038	48,694	7,281,195
VIET NAM	239,247	56,763,737	177,359	34,509,790
ISRAEL	164,287	23,261,530	203,142	37,958,409
ZAMBIA	124,200	17,898,200	244,342	116,376,424
GEORGIA	121,050	27,618,005		
MALI	112,914	47,488,539	69,902	47,492,235
MEXICO	108,000	114,424,150	30,221	49,336,927
NEW ZEALAND	101,800	31,431,258	33,369	12,985,752
AZERBAIJAN	92,174	34,541,645	168,000	75,390,229
ETHIOPIA	79,828	11,660,575	31,024	4,553,360
SPAIN	78,865	13,384,210	428,424	77,797,608
MOROCCO	74,400	10,313,356		
PERU	74,400	15,836,354	528,415	151,253,932
INDONESIA	71,280	34,882,870	300,405	108,228,472
GUINEA	54,636	48,833,215	6,708	5,438,736
CONGO DRC	52,598	32,729,893	51,746	51,970,748
MYANMAR	52,264	23,450,189	255,125	78,561,771
NIGER	51,740	46,176,191	26,570	12,029,585
TANZANIA	51,682	10,213,235	139,572	93,332,665
BAHRAIN	50,042	8,739,419	20,729	3,879,412
AUSTRIA	48,960	10,481,768		
BRAZIL	36,229	14,782,155	25,139	18,396,501
ARGENTINA	34,000	7,882,065		
SENEGAL	31,044	27,852,380	47,237	43,831,125
CAMEROON	30,551	8,616,528	80,603	12,346,893
ITALY	28,400	40,783,132	29,293	59,063,007
MALTA	27,018	11,919,124	3,360	1,953,779
ANGOLA	25,380	5,630,129	1,200	420,632
ROMANIA	25,280	7,786,829	185,161	62,863,006
MAURITANIA	20,696	18,154,348	25,800	7,055,504
TAJIKISTAN	19,040	3,054,650	24,000	8,297,557
MOZAMBIQUE	10,636	1,435,553		
GAMBIA	10,348	8,794,880	5,174	5,353,332
TOGO	10,348	8,839,746	5,175	5,259,131



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CYPRUS	10,286	3,560,735		
SYRIA	7,860	1,596,822		
GABON	5,174	4,898,486	5,174	5,365,792
UGANDA	5,159	4,861,057		
ICELAND	4,599	3,556,857		
KUWAIT	4,238	3,388,664		
SWAZILAND	2,722	2,863,747	206,274	66,358,363
PAPUA NEW GUINEA	2,612	2,444,664		
MALAWI	2,360	2,213,925		
ALBANIA	2,060	653,840		
BELGIUM	960	1,014,171		
FRANCE	876	681,768	744	1,302,240
CZECH REPUBLIC	300	1,204,070	297	539,204
NORWAY	48	28,359		
ZIMBABWE	40	4,595		
BELARUS			19,840	7,794,723
BENIN			6,708	5,438,316
CHILE			76,301	45,113,119
EL SALVADOR			14,648	3,340,458
HUNGARY			1,000	1,000,982
KOREA			200	557,655
LEBANON			26,840	11,222,339
TURKMENISTAN			20,100	3,610,760
VENEZUELA			15,000	6,108,879
TOTAL	547,635,640	169,490,873,524	471,681,752	161,706,958,503

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